

PRESERVERPARTNERS

Position Description

PreserverPartners is seeking a full-time entry-level Investment Analyst. The successful candidate will work closely with the Portfolio Manager to conduct investment research through fundamental and quantitative analyses.

Primary Responsibilities:

- Assist in idea generation and investment research of publicly traded securities;
- Provide initial and on-going investment related due diligence including analyzing investment materials and drafting investment notes;
- Assist investment team with special projects;
- Analyze portfolio construction strategies to identify, quantify and implement best practices across the investment portfolio;
- Analyze, maintain and improve monitoring process for investment exposures and risks to enhance the investment team's ability to understand and manage risks; and
- Lead or assist in the production of research reports, white papers and other ad-hoc reports.

Minimum Qualifications:

- Enrollment in CFA or CAIA program is preferred;
- Bachelors degree in Finance, Economics, Accounting, Statistics, Econometrics or related;
- Proficient in PowerPoint and Excel and excellent communication, research, quantitative, and analytical skills;
- Ability to work effectively in a team;
- Possess investment knowledge, initiative, flexibility, and innovation;
- Keen interest in investing and capital markets; and
- 2-5 years industry experience preferred. This is an entry-level position.